

POSITION DESCRIPTION

IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3

OSER-DCLR-10 (Rev. 08-2010)
State of Wisconsin
Office of State Employment Relations

1. Position No.	2. Cert / Reclass Request No.	3. Agency No.
033518		437

4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS WI Department of Children and Families Division of Management Services	
6. CLASSIFICATION TITLE OF POSITION BUDGET & POLICY ANALYST AGENCY-ADVANCED	Bureau of Budget & Policy 201 E Washington Ave Madison WI 53703	
7. CLASS TITLE OPTION (to be filled out by Human Resources Office)	8. NAME AND CLASS OF FORMER INCUMBENT Jennifer Laufer Forms Technician	
9. AGENCY WORKING TITLE OF POSITION Budget & Policy Analyst	10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES MARCIE STEBBEDS BUDGET & POLICY ANALYST AGENCY-ADVANCED	
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Kim Swissdorf Budget & Policy Manager	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW? 9/21/15	
13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION ANALYSIS FORM (OSER-DCLR-84).		
14. POSITION SUMMARY - PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:		

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on Page 3.)

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %	GOALS AND WORKER ACTIVITIES	(Continue on attached sheets)
	SEE ATTACHED	

16. SUPERVISORY SECTION – TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See instructions on Page 2.)

- a. The supervision, direction, and review given to the work of this position is ☐ close ☐ limited ☒ general.
b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.
(Please initial and date attachments.)

Signature of first-line supervisor _____ Date _____

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.
(Please initial and date attachments.)

Signature of employee _____ Date _____

18. Signature of Personnel Manager _____ Date _____

DISTRIBUTE COPIES OF SIGNED FORM TO:
☐ P-FILE ☐ OFFICE OF STATE EMPLOYMENT RELATIONS ☐ EMPLOYEE ☐ DEPARTMENT ☐ CERT REQUEST COPY

DMS/BBP Budget & Policy Analyst Agency-Advanced

POSITION SUMMARY

Under the general direction of the chief of the Budget Section in the Bureau of Budget and Policy, this position performs professional, confidential analysis of budgets and program or agency policies for the Department of Children and Families (DCF). The Bureau of Budget and Policy is DCF's central (agency-level) budget office. The position supports the section chief, DCF budget director, and Secretary's Office (S.O.) in advanced and mission-critical budget and policy analysis. DCF's mission is to promote the economic and social well-being of Wisconsin's children and families.

The Department has approximately 800 permanent positions, as well as contractors, project positions, and limited-term (LTE) staff, stationed throughout the state. It has a biennial budget of about \$2.5 billion, comprised of a complex array of federal and state funding. Federal funds include discretionary programs awarded based on the Department's successful application; formula, match-based, and entitlement programs, such as the "IV-B," "IV-D," and "IV-E" programs for child-welfare, child-support enforcement, and foster-care and adoption; and major interrelated block grants (TANF, CCDF, SSBG, CSBG) with expenditures and reporting connections in other state agencies as well as DCF. State funds are received through general-purpose revenues (GPR); fees, payments for services, and gifts from private or non-profit funding sources (PR); internal program-revenue-service charges and payments from other agencies (PR-S); and appropriations from segregated trust funds and their interest earnings (SEG).

As a budget and policy analyst for assigned programs, organizations, or functions, this position is responsible for maintaining sufficient knowledge about specific federal and state programs, data sources, and processes to provide internal and external customers with timely and accurate information, explanations, and assistance. The advanced analyst performs complex assignments supporting agency decision-making regarding policy choices; potential initiatives and their implementation; and fiscal management, operations, and resource deployment. This includes developing the biennial budget for assigned programs, which typically includes both analysis (including estimates and calculations) of cost-to-continue or other issues not initiated by operating divisions, and assisting organizational units in issue identification and development. Following budget enactment, the budget and policy analyst guides budget implementation by helping staff and managers understand budgetary intent, developing and monitoring aspects of annual operating plans, and working with fiscal staff to implement adjustments as needed.

The major goals and activities for the position include some tasks specific to the biennial budget (e.g., calculating standard budget adjustments and change-to-base amounts) and other tasks specific to budget implementation and management (e.g., reviewing contract amounts, and creating the annual operating budget by reflecting biennial-budget amounts or re-estimates at a more detailed level in state and DCF budget-control and monitoring systems). In both contexts, budget analysts make budget-to-actual comparisons and expenditure or revenue projections, and make recommendations for funding or positions, budget adjustments, and controlling expenditures. During the biennial-budget development process (and other occasions) a budget and policy analyst writes and presents issue papers to facilitate decisions by the Secretary and other top agency managers, explaining how programs are structured and operating currently, and the policy and fiscal implications of options (no change or changes). Additionally, the budget and policy analyst reviews federal and state laws, regulations, and legislation (budget and non-budget) and prepares formal and informal estimates of their fiscal and other effects.

Keeping the section chief informed, the position works independently with staff at all levels of the Department; including the S.O.; division administrators; bureau directors; program managers; and accounting, information technology (IT), or other technical staff-gathering information and responding to questions. Budget and policy analysts, particularly at the advanced level, function as liaisons with (providing information and explanations to) counterpart analysts in the State Budget Office (SBO) in DOA and the Legislative Fiscal Bureau (LFB). They may also serve on, or lead, special project teams.

Time % Goals and Worker Activities

- 30% A. Develops significant parts of the Department's biennial budget request and provides information, explanations, and estimates to assist decision-making throughout the process (Secretary/Department, DOA/SBO/Governor, and legislative consideration of the Governor's recommendations).**
- A1. Using knowledge of Department organizations and/or state and/or federal programs, identifies potential issues, decisions required, and alternatives. Assists organizational units in budget issue identification and development and/or identifies alternatives and Department-level perspectives.
 - A2. Develops budget decision items (cost-to-continue and discretionary) for assigned programs, from conceptualization to detailed issue papers, with supporting documentation and justification. This may include policy and program review; data analysis; fiscal calculations and explanations; state and federal revenue estimates; and consideration of whether implementing statutory language is needed, existing and potential administrative rules, and perspectives of other agencies and stakeholder groups.
 - A3. Assists in establishing the adjusted base budget (reconciling budget and position authority changes).
 - A4. Calculates Standard Budget Adjustments (SBA's), and/or reviews others' SBA calculations for specific programs and appropriations.
 - A5. Writes issue-identification papers and briefing papers for review by section chief and director. This involves summarizing issue papers written by program staff, to improve brevity, clarity, or accuracy—and creating entire papers presenting background, analysis, and options for issues not addressed, or not adequately addressed, by operating divisions—including estimating the cost or savings for alternatives.
 - A6. Provides information and briefing materials for key decision makers, orally presents briefing materials or leads discussions, and supports briefings and presentations conducted by chief, director, or others.
 - A7. Records decisions, and writes, subject to review by section chief and director, budget decision-item narratives (DINS) and prepares B-2s, B-3s, and other required forms and supporting materials (e.g., B-10s, spreadsheets, papers, etc.) and may enter them into state budget system ("Sharepoint" or successor).
 - A8. Re-estimates revenues and expenditures as appropriate for formulation of Governor's recommendations and Joint Finance Committee (JFC) review of biennial budget or budget-adjustment legislation.
 - A9. Reviews and comments on, and/or proposes revisions to, draft bill language, taking into account agency and administration policy, fiscal, and operational preferences. Reviews and analyzes pending or enacted budget legislation and identifies options for partial vetoes.
- 25% B. In consultation with Bureau management, implements budgets through development, monitoring, and modification of annual operating budgets for assigned programs and organizations.**
- B1. Identifies, interprets, communicates, and/or establishes appropriation and Wismart line budgets using biennial budget or other legislative file maintenance, grant award levels, or knowledge of program expenditure patterns, contracts, accounting practices, etc. Consults with other fiscal and accounting staff, program managers, and DOA, to promote coordination.

- B2. Advises Department, program managers, or organizational management about implementation requirements and timelines relating to budget bill provisions or other sources of legal authority (e.g., state appropriation law and definitions, JFC motions, etc.) and fiscal or other assumptions (e.g., caseload).
- B3. Reviews proposed contracts, relationships between calendar-year and multi-year contracts and fiscal year budgets, and methodologies for distributing funding or determining allocations to individual recipient agencies.
- B4. Regularly makes expenditure projections for large or sensitive programs, such as Wisconsin Works, Wisconsin Shares (child care subsidies); child-support enforcement; and adoption, foster care, and other child-welfare aids; and/or performs or assists with budget-to-actual analysis and reporting for the overall budget for Temporary Assistance for Needy Families (TANF) and child care funds, or other major programs.
- B5. Analyzes administrative budgets, position authority and utilization or vacancy rates, and actual or projected expenditures and under-spending. Recommends viable options and alternatives to align expenditures with budget (based on knowledge of appropriation definitions and programmatic constraints, historical budget usage, federal funding structures and allowable costs, position authority by appropriation, etc.).
- B6. Reviews short-term and ongoing affordability of requests to create or fill positions and may perform informational/simplified cost-benefit analyses (CBAs) to evaluate whether to hire, or support hiring, contracted employees, or for analytical purposes.
- B7. Prepares reports and presentations for division administrators and/or other top agency management on budget status, resource utilization, and consistency with management priorities and strategic plans. Recommends options to, and implements decisions made by, management—ranging from routine budget adjustments to budget-reduction plans.
- B8. Performs projections and analyses to identify, calculate, and justify allotment increases, line-transfer and cross-numeric TAs (transfer-appropriation transactions), and other spending-authority requests—including compensation or other supplements consistent with DOA / SBO requirements, and requests to the JFC under ss. 13.10, 13.101, 16.54, 16.515, and special provisions of the budget act.
- B9. Uses the state accounting/spending-control system (Wismart) to establish new appropriation accounts and spending lines and to submit allotment increases, decreases, and line transfers (accompanied by written explanations) for the approval of the section chief and DOA, and maintains (for historical analysis or potential auditor review) records of allotment requests and approvals.
- B10. Performs feasibility analysis of program-revenue or other required lapses, and coordinates implementation with Bureau of Finance staff.
- B11. Makes, coordinates, and reviews detailed modifications to annual operating plan display and reporting tools (e.g., Expense Budgets & "Dashboard") consistent with approved appropriation-level and DOA-line-level allotments initiated by DCF (or by SBO/DOA for actions relating to non-budget legislation or JFC actions).

20% C. Policy, program, and legislative research and analysis; special studies or projects.

- C1. Monitors biennial budget developments throughout the legislative process, from submission of the agency's request, through introduction of the Governor's recommendations, LFB issue paper preparation and action by the JFC, modification in the Assembly, Senate, or conference

committee, and final enactment, including gubernatorial veto. Provides comparisons of fiscal effects (change-to-base, agency compared to Governor, Governor compared to JFC, etc.).

- C2. Analyzes other (non-budget) state legislation and prepares fiscal estimates and bill analyses (summaries and policy analyses) within permissible timeframes.
- C3. Analyzes federal budget, legislation, regulations, and policy communications, and materials produced by national organizations to determine potential impacts, estimate future funding levels, consistency of current or contemplated expenditures and policies, impacts on staffing or other delivery resources, local agencies, etc.
- C4. Provides advice and analysis relating to fiscal or other implications of state implementation of federal options and compliance agreements (e.g., program-improvement plans and waivers).
- C5. Independently identifies, or is assigned, issues or questions relating to program practices, policies, and performance. Reviews or performs research, surveys, etc., to address the questions and evaluate program performance or results in relation to intended purpose, strategic plans, alternative resource use, potential efficiencies, etc.
- C6. May lead formal or informally constituted project teams of other staff from Budget Bureau and/or multi-division staff (e.g., program, BITS, and Finance representation) conducting program analysis (internal audits of the efficiency and effectiveness of existing programs and practices) or planning and implementing initiatives.
- C7. Reads research studies, web sites, news accounts, etc., to develop or maintain familiarity with state-government context, other states' practices, or reported best practices, non-DCF programs related to DCF programs (e.g., services to children, youth, families, related funding), etc.
- C8. Researches past budgets, expenditures, and fund-source patterns to provide information and context in response to inquiries from Legislative Audit Bureau relating to annual fiscal audits or programmatic audits of the Department's management of specific programs.

15% D. Multi-directional communications

- D1. Summarizes analytical findings in writing, concisely when required, and makes oral presentations to interested parties ranging from section chief and/or director to agency management or external groups.
- D2. May represent the Department in discussions with-or explain its biennial budget proposals, initiatives, or policy positions to—interest and advocacy groups, local government associations, and advisory committees.
- D3. Through such means as regular formal or informal status meetings ("check-ins"), courtesy copies of e-mails, summaries of meetings, etc., keeps section chief informed about perspectives being expressed by program divisions, and regularly consults with section chief regarding work requests and priorities.
- D4. Regularly communicates with staff and managers in assigned program areas to maintain familiarity with programmatic and organizational developments. At the agency—advanced level, the budget and policy analyst displays an ability to use a good balance of e-mails, phone calls, and in-person consultation, and initiates meetings to facilitate cross-organizational discussions (e.g., staff from different bureaus, divisions, Finance, BITS, etc.). May hold standing meetings with bureau directors or others to discuss budget and management issues on an ongoing basis and serve as a resource.

- D5. Communicates decisions and policies from top management to program divisions and other internal implementers (e.g., Finance or IT programming staff). These communications may relate to sensitive or confidential topics, including reorganizations, budget or staffing reductions, and prioritization of some programs over others.
- D6. Develops prompt and accurate responses to external inquiries—responses appropriate to the audience (e.g., reflecting department or administration policy positions, and different responses appropriate for S.O., DOA, LFB, auditors, interest groups, news media, etc.). The content of these responses may range from coordination, compilation, and/or abbreviation of information provided by others to presentation of information based on personal knowledge base, research, and calculations. Specific examples include:
- Regular phone and e-mail liaison with counterpart analysts in DOA (SBO) and LFB;
 - Producing and coordinating information for annual reports and/or biennial LFB information papers;
 - Creating drafts of monthly or other regular reports to Governor, Legislature (e.g., JFC) or others;
 - Assisting chief, director, and DCF Communications staff in responding to news media.
- D7. Solicits information, data, and cooperation from other state and local agencies and assists with the content or coordination of contracts, agreements, and memorandums of understanding (MOUs).

10% E. Miscellaneous

- E1. Reviews state plans or applications for federal funding, and/or contributes to applications for federal or other grant funding, depending on assigned program areas and current department procedures and priorities.
- E2. Assists assigned divisions and programs with special events, recruitments, project selection, requests for proposals (RFPs), work groups, etc. when possible given primary budget and policy responsibilities.
- E3. Attends job-related training or undertakes skill-building activities, work-related field trips, etc. Attends or completes training applicable to all DCF staff (e.g., new-employee orientation, security awareness, etc.).
- E4. Assists other team members, particularly newer analysts, or may perform cross-assignment tasks as an educational opportunity, to cover for absences, or due to workload demands.
- E5. Participates in voluntary activities such as serving as "floor captain," or budget-office or division representative on committees, the State Employees Combined Campaign, or other Department-endorsed events, and activities all employees are authorized to do on state time (e.g., wellness assessments, completing feedback surveys about training or other presenters, or seeking input from DCF staff generally).
- E6. Other duties as assigned.

Knowledge, Skills and Abilities

1. Analysis skills and abilities including:
 - Ability to comprehend and summarize complex written documents and on-line sources, and information conveyed in e-mail, orally, and in meetings involving multiple participants—and to combine or synthesize such information with related quantitative data, remember key points, and integrate into future work products;
 - Critical thinking, logical thinking, flexible thinking, and curiosity;
 - Knowledge of basic math principles, ability to make accurate calculations, and ability to apply mathematical and logical techniques to data using spreadsheet software (such as Excel), data-base queries, etc., and to understand and interpret spreadsheets and tables created by others.
 - Ability to appropriately make, explain, and apply assumptions; and
 - Accuracy and attention to detail.
2. Knowledge of standard written English spelling, grammar, and style, including demonstrated ability to compose well-written documents.
3. Ability to use desktop word-processing software (e.g., Word) to create letters, issue papers, agendas, and short briefing papers and "one-pagers," which may use an abbreviated-sentence ("bullet point") style
4. Knowledge of state legislative process, budget process and terminology and of statutory processes for budget modification by the Joint Committee on Finance (s. 13.10/13.101, s. 16.54, s. 16.515, etc.).
5. Knowledge of state of Wisconsin funding structure (types of revenues, funds, appropriations) and ability to acquire and use knowledge of DCF-specific budget and expenditure-tracking categories.
6. Highly developed oral communication and interpersonal skills, including:
 - Ability and willingness to ask questions;
 - Active (attentive) listening for information, direction, or points of view;
 - Ability to explain background, issues, problems, and alternatives to supervisors, peers, and Department management, in formal and informal settings, occasionally including speaking to outside groups;
 - Ability to adjust explanation to audience, setting, and time given;
 - Ability to balance tact and sensitivity with the ability to speak authoritatively as the situation requires;
 - Ability to display objectivity, explain alternate perspectives, and defend proposals one may not personally agree with; and
 - Ability to establish and maintain effective working relationships with colleagues and superiors throughout the department, and with analysts from the state budget office (DOA) and Legislative Fiscal Bureau.
7. Ability to work independently and exercise good judgment.
8. Planning and organizational skills, including time management and ability to prioritize, accompanied by strong work ethic (reliability, punctuality, persistence, and personal accountability).
9. Tolerance for occasional stress associated with multiple concurrent priorities, changing or short deadlines and being expected to provide responses that are both fast and accurate.
10. Knowledge of public policy and finance principles and theory, and familiarity with current intergovernmental relationships and practices,